

WebIntelligence 3.1 Rich Client Course Summary

Description

This class is a combination of instructor-led lecture, discussions, and demonstrations with a heavy emphasis on hands-on workshops to teach WebIntelligence Rich Client. Topics include; creating new documents, formatting reports, functions, reporting from Personal Data Files. Merging dimensions between multiple data providers. Working in local mode, and differences between WebIntelligence and Rich Client.

Objectives

At the end of this course, students will be able to:

- Work with Universes, Personal data files, and stored procedures to create reports
- Learn how to merge dimensions across multiple data providers
- Learn how to create multiple Queries
- Work in local mode

Topics

- What Is WebIntelligence™ Rich Client?
- WebIntelligence™ Thin Client/Rich Client Differences
- What Is A Universe?
- What Are Objects/Query?
- Saving Documents
- Saving to Local File Formats
- Adding New Queries
- Duplicating Queries
- Deleting Queries
- Merging Dimensions to Link Data Providers
- Creating Single Report Blocks From Multiple Data Providers
- Using Personal Data Files
- Working in local mode
- Saving Changes
- Resetting Changes
- Viewing/Editing Documents
- WebIntelligence™ vs Rich Client

Audience

This course is designed for WebIntelligence users who create their own documents and/or anyone using Desktop Intelligence reporting.

Prerequisites

Students should have basic Windows skills.

Duration

One day

WebIntelligence 3.1 Rich Client

Course Outline

I. Overview

- A. WebIntelligence Rich Client™ As a Tool
- B. What Is WebIntelligence™ Rich Client?
- C. WebIntelligence™ Rich Client/Full Client Differences
- D. What Is a Universe?
- E. WebIntelligence™ Rich Client Users
- F. Getting Started with WebIntelligence Rich Client™
- G. What Are Objects?
- H. Introduction to Blocks
- I. Logging In
- J. Importing and Exporting Documents
- K. Saving Documents Locally

II. Creating New Documents

- A. What Is a Query?
- B. Adding Objects
- C. Adding Query Filters
- D. Using Query View
- E. Using Report View
- F. Saving Documents to Favorites
- G. Saving Documents to Local File Formats

III. Formatting Reports

- A. Inserting, Duplicating, Deleting, Renaming Reports
- B. Inserting Columns
- C. Removing Columns
- D. Moving Columns
- E. Adding New Columns and Rows
- F. Sizing Rows and Columns
- G. Using Fonts, Colors, etc
- H. Justification

IV. Functions

- A. Ranking
- B. Breaking
- C. Folding
- D. Sorting
- E. Filtering
- F. Creating Input Controls
- G. Calculations

V. Alerters

- A. What are Alerters
- B. Creating Alerters
- C. Creating Sub-Alerters
- D. Applying Alerters to Reports

VI. Using Multiple Data Providers

- A. Adding Queries
- B. Using Non-Universe Data Providers
- C. Merging Dimensions from Different Data Providers
- D. Using BI Services
- E. Creating documents from BI Services